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ABSTRACT

Education is already a big business. E-learning, by making it easy to import information and skills to anyone, anywhere, anytime, and for any purpose will grow the education market. The big winners will be those vendors that identify and serve emerging and sometimes hidden markets. The biggest growth segments unleashed by e-learning are education for non-traditional students and the use of educational methods in related areas such as public relations, sales, and investor relations. E-learning permits dramatic expansion of the education market. While distance learning is the best-known example, the authors suggest that providing continuing education for busy professionals is a much bigger opportunity. E-learning is primarily about superior solutions for self-study and online courses. These solutions, however, can be readily adapted to sales and public/investor relations. In both cases, the object is to get information across to the recipient. While the education industry correctly emphasizes the learner, that does not mean there is no longer a need for teachers. Teaching and persuading have many things in common and can share many of the same advanced tools. Corporate training and personal career development are segments ripe for explosive growth. Businesses need to impart both general skills and company-specific information to their employees. They need solutions that are highly reliable, consistent, and available in order to bring new employees quickly up to speed. Increasingly, corporations are realizing that the Internet and extranets can be used to train customers and business partners, as well as persuade investors, consultants, industry analysts, and potential customers. (Author)

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International E-Learning Business: Opportunities & Strategies

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Abstract

Education is already a big business. E-learning, by making it easy to impart information and skills to anyone, anywhere, anytime, and for any purpose will grow the education market. As always, the big winners will be those vendors that identify and serve emerging and sometimes hidden markets. The biggest growth segments unleashed by e-learning are education for non-traditional students and the use of educational methods in related areas such as public relations, sales, and investor relations. E-learning permits dramatic expansion of the education market. While "distance learning" is the best-known example, we believe providing continuing education for busy professionals is a much bigger opportunity. E-learning is primarily about superior solutions for self-study and online courses. These solutions, however, can be readily adapted to sales and public/investor relations. In both cases, the object is to get information across to the recipient. While the education industry correctly emphasizes the learner, that does not mean there is no longer a need for teachers. Teaching and persuading have many things in common and can share many of the same advanced tools. Corporate training and personal career development are segments ripe for explosive growth. Businesses need to impart both general skills and company-specific information to their employees. They need solutions that are highly reliable, consistent, and available in order to bring new employees quickly up to speed. Increasingly, corporations are realizing that the Internet and extranets can be used to train customers and business partners, as well as persuade investors, consultants, industry analysts, and potential customers.

Key Enabling Technologies

The gradual development of e-learning standards will lead to interoperability between content, learning platforms, and testing. This, in turn, will make it easier and less costly to develop courses on highly specialized topics and for niche markets. To wit, the best tools will be available and affordable for use with all topics, whether popular or esoteric.

Networks will play a particularly important role, making it possible to deliver content and courses in new ways, and changing the way students, teachers, and others interact. The public Internet is central, but it is not the whole story. Private networks and virtual private networks (VPNs) will also play significant roles.

The Web is both a global marketing channel and a delivery vehicle. While the lack of significant local markets has been an obstacle to highly specialized courses, it is not the only obstacle. Just finding such courses can be a major problem. For the first time, there is a fast and convenient way to both identify and access specialized courses. The Internet can be used for real-time classes (distance learning) and non-real-time classes -- or a combination of the two.

LANs enable classroom automation, and can be used to enhance the educational value of conferences and seminars. While schools have invested heavily in personal computers, they often put them in computer labs where students are taught how to operate them -- but for no specific purposes. Wireless LANs enable distributing PCs throughout the school and moving them around as needed.

Virtual private networks enable education institutions to create virtual campuses with whatever geographic reach is desired. VPNs also enable enterprises to extend education to workers, business partners, and resellers in the field. The continued growth of VPNs, however, depends on the industry's ability to prevent major security breaches.

Mobile learning will make it possible for busy professional to pursue continuing education. Public wireless LANs and 3G wireless networks will enable users to remotely access courses, content, and other learning resources. Though some 3G wireless networks have been delayed, others haven't, and

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the migration to 3G networks that support high-speed data is inevitable. (See our report: "Third Generation Wireless: Business Models & Strategies."

E-books have not had much success in the consumer market, but they could become a factor in the corporate training and post-secondary education markets. For example, the equivalent of several large textbooks could be stored in a much smaller and lighter weight package. E-books could also be used to train service technicians; after they complete the training the ebook becomes a convenient way of carrying a complete library of service manuals.

The development of multimedia content for education will create demand for better ways to search for and identify video and audio content. Thus, training and education in general may provide the stimulus for new products and services addressing this problem. The use of metadata and pattern recognition software are promising methods for cataloguing audio and video content.

E-learning products and services may also be enhanced through the use of speech recognition, text-to-speech, and natural language technologies. The use of voice technology is particularly useful in teaching and practicing foreign languages. Voice technology will extend the reach of online e-learning courses to any telephone. Thus, learners could study a few minutes here and there, in different places and at different times. For busy professionals, voice technology could prove helpful in squeezing learning into their schedules (for example, while commuting to and from work).

Copyright protection is a key concern for the e-learning industry. A number of solutions, generally referred to as digital rights management (DRM), do more than just protect content from unauthorized access and distribution. DRM can be used to control the number of times that material is viewed, whether it can be printed, how long it is accessible, and so forth. Thus, DRM will enable content producers to block sales of "used" content for which they are rarely compensated.

Key Business Opportunities

The biggest opportunities for e-learning are for content producers and distributors. E-learning enables those who have knowledge to reach a wider audience, both in terms of geographic reach and audience composition through the use of different versions (packages).

There are also opportunities for software developers. Learning/testing platforms, authors' tools, and virtual campuses are among the best. Online courses and mobile learning create opportunities for software that is highly interactive and can intelligently suspend/resume lessons as needed. There is still much to be done in development of custom courseware that adapts to the learner's needs, knowledge, and skill set.

Given the size and importance of the education market, one should not rule out the need for special hardware. For example, e-books should be adapted to the needs of students and trainees. Education, rather than the convenience of reading a backlit display in bed, may prove to be the bigger market for e-books.

There are numerous opportunities for e-learning portals, online universities, and mobile learning (m-learning) services. These service providers can also benefit from specialized tools. As telecom operators strive to move up the value chain, education and persuasion will prove key markets. We would not be surprised to see virtual network operators emerge, focusing exclusively on education and persuasion.

Main Driving Forces of Global E-learning Markets

Education is the second largest service sector in the global economy (health care is the largest), and K-12 is the largest segment within the education sector. It is estimated that worldwide education expenditures have reached US$2 trillion per year. E-learning accounts for perhaps 0.1% today; thus, increasing e-learning's share to a mere 1% would expand the market for e-learning products and services by nearly US$20 billion. According to UNESCO statistics, there were 1.15 billion students enrolled worldwide in primary, secondary, and higher education in 1997.

The key to e-learning firms' future profits is what analysts call "scalability." With traditional classroom teaching and training, class size is limited. For example, it is generally agreed that class sizes for continuing education seminars should not exceed about twenty students. This is also true for many higher education courses. The size limit, however, severely constrains profits. One hour of a

teacher's time in class cannot generate more revenues than about twenty hours of seminar attendance. This puts a cap on the scalability and profit potential of traditional classroom education.
In computer-based training (CBT), the distribution of production costs between fixed and variable sources is radically different. The fixed costs of producing one hour of training are very high -- much higher than preparing an hour of traditional classroom teaching. But the variable cost of providing an additional hour of computer-based training is much lower. Thus, the average cost of providing an hour of computer-based training decreases with the number of students. The number of CBT students is not limited by classroom size and class manageability. Thus, the number of students worldwide for a specific CBT product determines the average cost per hour.
E-learning is also more scalable because the Internet makes it fairly easy to reach a worldwide market. The cost of marketing and distributing a course over the Internet is much lower than an advertising campaign using print media or sending CD-ROMs through the mail. It is the combination of worldwide market reach, low marketing/distribution costs, and a product with very low variable production costs that adds up to potentially high profits for e-learning products.

E-learning for K-12

The prospects for e-learning in the K-12 market segment are very strong. According to UNESCO, there are currently 1,175 million students enrolled in K-12 institutions worldwide. Internet connectivity for secondary schools in most West European countries and the U.S. was estimated between 80% and 100% in the second half of 2000. The markets for primary and secondary education are the largest education market segments in the U.S. and worldwide. Expenditures in the U.S. for primary and secondary schooling reached US$371.9 billion in 1998, or 4.4% of GDP. Enrollment in the U.S. is expected to grow further. The study "The Knowledge Web" by Moe and Blodgett [2000] estimates the K-12 e-learning market in the U.S. at US$1.3 billion. They expect it to grow to US$6.9 billion by 2003.

E-learning for Higher Education

Higher education is a growth market. In the U.S. alone, 15 million students are enrolled in higher education. Worldwide, there are 84 million students pursuing higher education. Expenditures in the U.S. for post-secondary education, both private and public, are growing steadily, having reached US$146 billion and US$87 billion for the 1997-1998 school year in the public and private sector, respectively. The "Report of the Web-Based Education Commission to the President and the Congress of the United States" shows that growth in jobs requiring a higher education continues. According to the report, in 1950 the majority of jobs (60%) required no special skills. Today, 85% of jobs in the U.S. require an education beyond high school, up from 55% in 1991.

The Post-Secondary E-Learning Market

Moe and Blodgett (2000) estimate that the post-secondary online education market currently generates US$ 1.2 billion per year. They expect the market to grow to US$7 billion by 2003. Within this market segment, enrollment in distance learning demonstrates the growth potential of Internet-based course delivery. The graph below shows a sharp increase in enrollment in distance learning courses between 1995 and 1998. The "Agenda Project" report of the U.S. Department of Education (Office of Post-secondary Education) shows that the number of people enrolled in distance learning courses at post-secondary institutions in the U.S. nearly doubled between 1994-95 and 1997-98. The share of students enrolled in distance education as a percentage of total post-secondary enrollment was 5% in 1998, expected to rise to 15% by 2002. The "Report of the Web-Based Education Commission to the President and the Congress of the United States" shows that 710,000 students were enrolled in distance learning courses in 1998. The report predicts that enrollment will increase to 2.2 million by 2002. While 62% of four-year colleges offered distance learning courses in 1998, the share is expected to increase to 84% by 2002. In particular, online MBA programs are expected to grow rapidly. The global market for online post-secondary education was US$875 million in 1998 and is projected to reach US$3.9 billion by 2002. Crucial to the development of e-learning courses is the availability of technology-based content. In 1998, there was already a large selection of academic learning software

(3,300 titles) available. Most of this content is CD-ROM-based; the potential for using such content to supplement online courses is significant.

E-learning for Continuing Education

Many non-profit universities, such as Pennsylvania State University, the University of California at Los Angeles (UCLA), and the University of Wisconsin, have a long tradition of developing continuing education programs and courses through their extensions and outreach divisions. Many of these programs have begun to use online course delivery. For example, the School of Continuing Education at New York University, one of the largest programs in the U.S. (60,000 students), offered 30 online courses in fall 1997. Penn State World Campus wants to develop 30 certificate programs based on more than 300 courses. The University of California-Berkeley Extension also offers a large number of certificate courses online. Another e-learning pioneer is Athabasca University (Alberta, Canada) (http://www.athabascau.ca/) Its Centre for Innovative Management was the first to offer a complete MBA program online (in 1994). Many traditional e-learning firms are in the process of entering the e-learning market. Examples are Achieve Global, ARIS Coporation, Development Dimensions International, DeVry, ExecuTrain, Franklin Covey, Global Knowledge Network, Learning Tree International, New Horizons Worldwide, and Provant. For continuing finance education, New York Institute of Finance (http://www.nyif.com), Canadian Securities Institute (https://www.csi.ca/pub/en/index.html), and the efiport AG in Germany (http://www.efiport.de) now offer web-based courses.

E-learning for Corporate Training

E-learning for the corporate market is a function of B2B e-commerce. The second largest e-learning segment is also the quickest at adopting new technologies: the corporate training market. For example, a single U.S. company such as General Electric spends US$500 million on training and education per year.

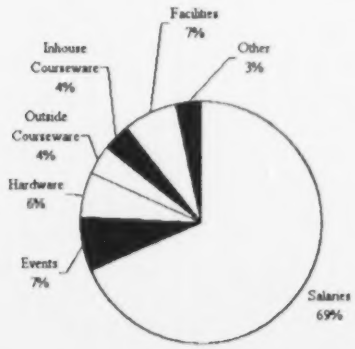

Figure: Annual global training expenses [2]

Corporate universities are a particularly interesting elearning segment. In the U.S., the number of corporate universities has grown from 400 to 1,800 over the last thirteen years. According to the "Report of the Web-Based Education Commission to the President and the Congress of the United States," 40% of Fortune 500 companies have established a corporate university. A survey conducted by Corporate University Xchange suggests elearning will rapidly gain market share in corporate training. In 1999, traditional classroom training (c-learning) was the dominant course delivery mode with an 80% share. By 2003, Corporate University Xchange predicts this share will decline to 60%, with e-learning grabbing the remaining 40% share.

Training Magazine estimates roughly US$62.5 billion was spent on formal training by U.S. organizations in 1999. This is an increase of 24% compared to 1993. The major share (44%) was spent

[2] From: http://www.internettime.com/itimegroup/market.htm

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on trainer salaries, another 24% went to outside providers of training products and services, and the rest was used for facilities, materials, hardware, seminars, and conferences. This means outsourced training providers captured a 24% share of the corporate training market, which corresponds to US$15-17 billion.

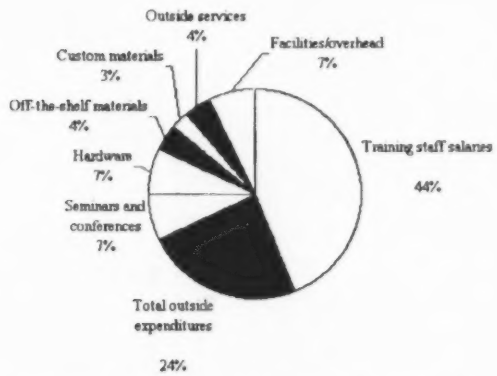

Figure: Corporate training budgets, U.S. (1999)[3]

Outsourced training accounts for nearly 30% of information technology (IT) training but less than 18% of soft skill training (e.g., seminars on time management). Around 10% of the IT training is technology or Web-based, whereas only 3% of the soft skills training is mediated through technology or the Web. The e-learning segment of the corporate training market in the U.S. accounted for about US$550 million and US$ 1 billion in 1998 and 1999, respectively. A particularly interesting segment is corporate IT training. In 1999, more than 2.2 million IT specialists worked in core IT occupations (computer scientists and engineers, systems analysts and computer programmers). Training Magazine notes that one third "of all employer-sponsored training in the U.S. is devoted to teaching people about computers." Today, technology-based IT training is a relatively small market in the U.S. with US$2.3 billion in revenues. However, this will change soon.

E-learning for Non-traditional Market Segments

There is a clear trend towards higher education for non-traditional student groups in the U.S. Between 1970 and 1993 the number of traditional students (age 18-24) enrolled in higher education increased by 35%. During the same period, the number of older students (above age 40) increased by 235%. Surprisingly, traditional undergraduate students (age 18-22 and who live on campus) made up just 16 percent of post-secondary enrollment in 1999, according to an article in Newsweek (April 16, 2000). Thus, traditional undergraduate and graduate students now account for less than one-third of U.S. higher education enrollment. Part-time and older students account for two-thirds of those enrolled in higher education. These non-traditional students are prime targets for e-learning because they are highly motivated but can't spend all day in classrooms. The primary target group for private education is self-directed, self-motivated, and ambitious students with job experience and clear learning objectives. A pioneer in for-profit adult education is the University of Phoenix. They have shown that providing higher education for non-traditional student groups is financially viable.

Customer Training and Client Education

E-commerce has clear competitive advantages for information-intensive products and services. The ability to employ e-learning for customer training is one of them. One example are the online computer courses known as "Educate U" (www.educateu.com), developed by Dell Computer Corporation and the Web-based training firm SmartForce. Anyone can take two basic courses for free.

[3] From: Ruttenbur, Spickler, and Lurie, [2000]. Source: Morgan Keegan estimates, National Center for Education Statistics, Training Magazine

Dell customers may receive three more courses for free, after which they become eligible to purchase courses from a selection of about 1,000 courses priced between US$5 and US$200 each.

Major Conclusions

- E-learning does not replace traditional classroom education. Instead, it expands the market for education products and services. Thus, e-learning assists the growing population of non-traditional learners, many of whom must divide their time between work and school, to pursue an education.
- E-learning solutions can be applied to non-education markets such as public relations, sales, and investor relations. The same tools developed to facilitate imparting knowledge to students can be used with great effect in persuading customers, investors, and commentators.
- Corporate training, career development, and expert enhancement are areas ripe for explosive growth. E-learning facilitates cost-effective production and delivery of courses for specific companies, jobs, and skills. It also enables organizations to adopt standard courses that can be kept up-to-date without confronting a logistical nightmare.
- E-learning technology enables course authors and producers to readily re-use content in different courses or different versions of the same courses. Thus, e-learning courses can be more customized than traditional e-learning courses. The ability to address special needs with minimal effort ensures the broadest possible market for any given content.
- While there has been much interest in using the Internet for "distance learning," its use as a global distribution channel presents a much bigger opportunity. Highly specialized courses for which there is insufficient local demand may do well in the global market. The Internet can also multiply the success of courses that do well locally.

Table. Growth prospects for e-learning technology in various market segments and time frames.

		0 - 1.5 years	1.5 - 3 years	3 - 5 years	Comments
Traditional					
K-12	US	medium	medium	low	Disillusionment in the US. Europe never really gets started.
	Europe	low	low	low	
K-12 supplementary	US	high	high	high	Homework assistance and special services for gifted children. Europe lags.
	Europe	low	medium	high	
University undergraduate students	US	medium	medium	high	Mainly e-books, online tutoring and later licensed video lectures supplementing textbooks. In Europe: limited willingness to pay for education; teaching content continues to be less standardized.
	Europe	low	low	medium	
University graduate students	US	low	medium	high*	Low domestic potential due to research orientation and large share of self-studying via free online content. *High enrollment potential for foreign students at U.S. e-learning centers. Europe will gain negligible share in this market.
	Europe	low	low	low	
Corporate training	US	medium	high	high	After initial disillusionment with cost-savings and quality, this segment will comeback strong with more targeted applications, a higher share of instructor-led courses, and quality content. Little difference between major US and European corporations.
	Europe	medium	high	high	

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Non-traditional					
Undergraduate	US	high	high	high	Growth is mainly supply rather than demand constrained (too few institutions & e-teachers). Europe lags.
	Europe	medium	medium	high	
Graduate	US	high	high	high*	Same as undergraduate plus: *High enrollment potential among non-traditional European students for (online) U.S. e-learning universities.
	Europe	medium	medium	high	
Professional (updating knowledge)	US	medium	medium	high	Big potential in medical research, law, finance, cross cultural marketing. Mainly constrained by dearth of experts with e-learning course design skills.
	Europe	medium	medium	high	
Expert (seeking specialized knowledge)	US	low	medium	high	Online tutoring by experts in niche applications such as data mining, engineering, quantitative finance, business plan design. Constrained by low market transparency and dearth of experts.
	Europe	low	medium	high	
Employee training, post M&A	US	medium	high	high	After M&A, corporate-wide learning often a matter of economic survival. Great potential in fields such as banking, insurance, automobile, aviation, hotel chains, chemicals, telecom services, software, consulting.
	Europe	medium	high	high	
Client/customer training	US	high	high	high	Will become part of customer relationship management (CRM).
	Europe	high	high	high	
Consumer (personal interest)	US	low	low	medium	Primary target group: age 55+. Big long term growth potential, but only modest medium term growth. Exceptions: financial planning and investing, foreign languages, and technology enabled communication among similar-minded, educated people.
	Europe	low	low	medium	
Non-Education					
Public relations	US	low	low	medium	Long term growth potential for select applications including (private sector) hospital and nursery home evaluation, school and college evaluation, environmental efforts of oil and chemical companies, and working conditions in high growth firms. Potential in public sector: SEC, consumer protection (e.g. mad cow disease), public pension plans, and tax law changes.
	Europe	low	low	medium	
Investor relations	US	high	high	high	This is the most promising application for e-learning outside traditional education.
	Europe	high	high	high	
Political campaigns	US	medium	medium	high	Offers potential for small parties and special interest groups (e.g. agriculture) exercising greater pressure.
	Europe	medium	medium	medium	

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- Virtual private networks enable creation of virtual campuses that extend out into the local community and beyond. In addition to distributing course content, VPNs can be used to facilitate communications between learners and instructors, for collaboration between learners, and to administer tests.
- Wireless LANs will enable K-12 schools and universities to provide a range of advanced services for students, faculty, and administrators. In K-12 schools, wireless LANs facilitate the use of PCs and the Internet in classrooms and laboratories that lack network wiring. Wireless LANs on university campuses will permit students to access a variety of resources (such as online libraries) from their own laptop PCs and PDAs.
- Third generation wireless technology will enable mobile learning (m-learning). This will open entirely new opportunities for busy professionals who don't have time to attend classes. It will also spawn development of courses designed for "bursty" learning.
- Digital rights management (DRM) can be used both to protect content and facilitate creation of different versions. DRM technology was primarily developed to prevent unauthorized access and redistribution, but it can also limit authorized use to create targeted versions at different prices for specific customer groups. Thus, a quick refresher course that expires in two weeks could be offered at a low price.
- E-books have not experienced much success in the mass market. However, they are a perfect fit for many e-learning markets. E-books simplify distribution of the latest versions of service manuals and catalogues. They also enable non-traditional students and field workers to carry a library of reference materials in a small and lightweight package.

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